NOTES

- ✓ Miscellaneous Notes
- ✓ Encounter Notes
- ✓ Group Notes

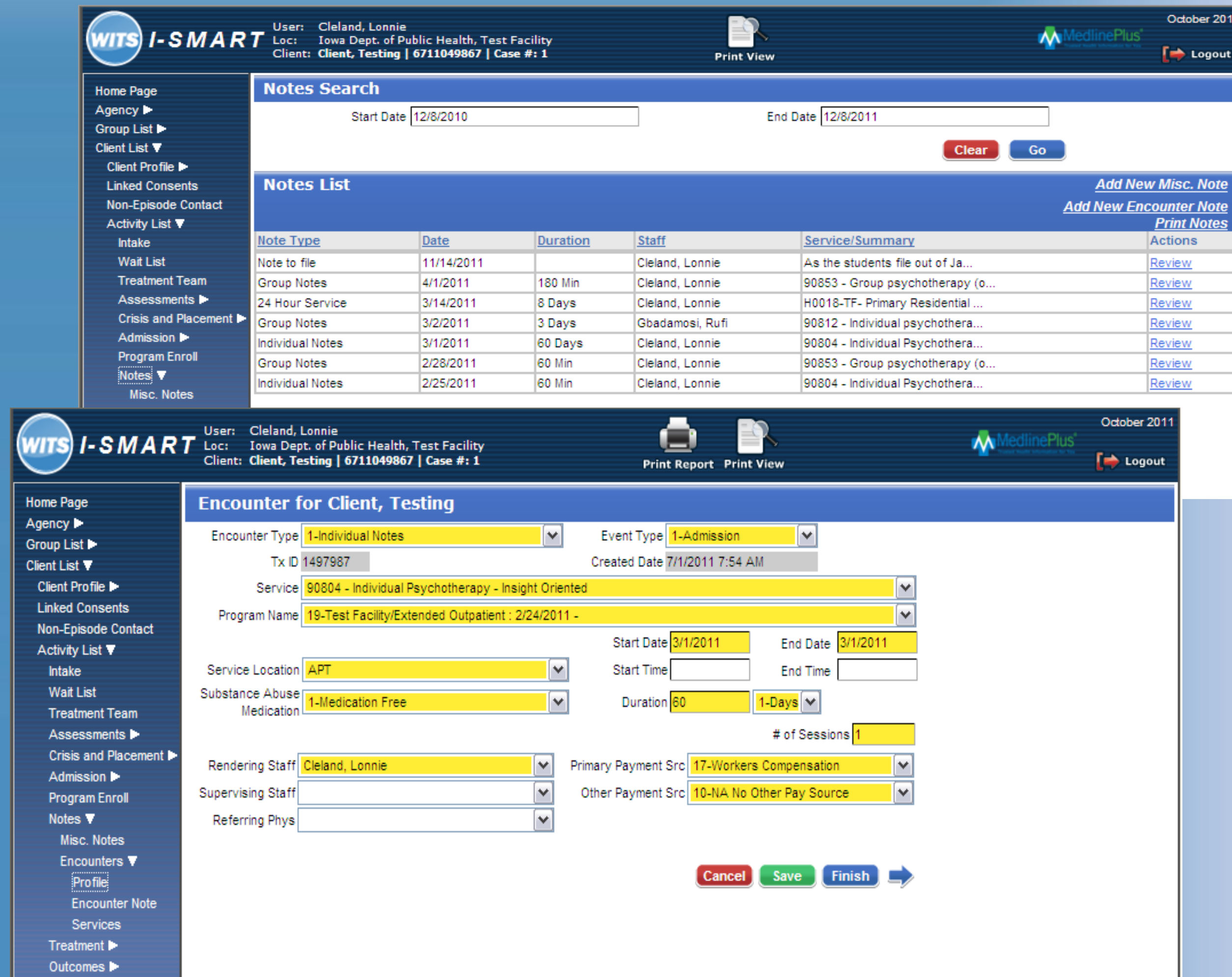
Notes

This module allows you to document a variety of notes which serve different purposes. There is a Miscellaneous Notes screen to capture notes documenting phone calls, case management notes, and other non-billable, non-face-to-face contacts. There is an Encounters sub-module used to document client/counselor face-to-face encounters and notes regarding services provided. The Group Notes module is used to quickly and easily document therapy contacts for a group of clients.

1. To access the **Notes** module, go the **Activity List** menu and then click the **Notes** menu item.

2. This will bring you to the **Notes List** which shows all previously entered **Miscellaneous** and **Encounter Notes.**

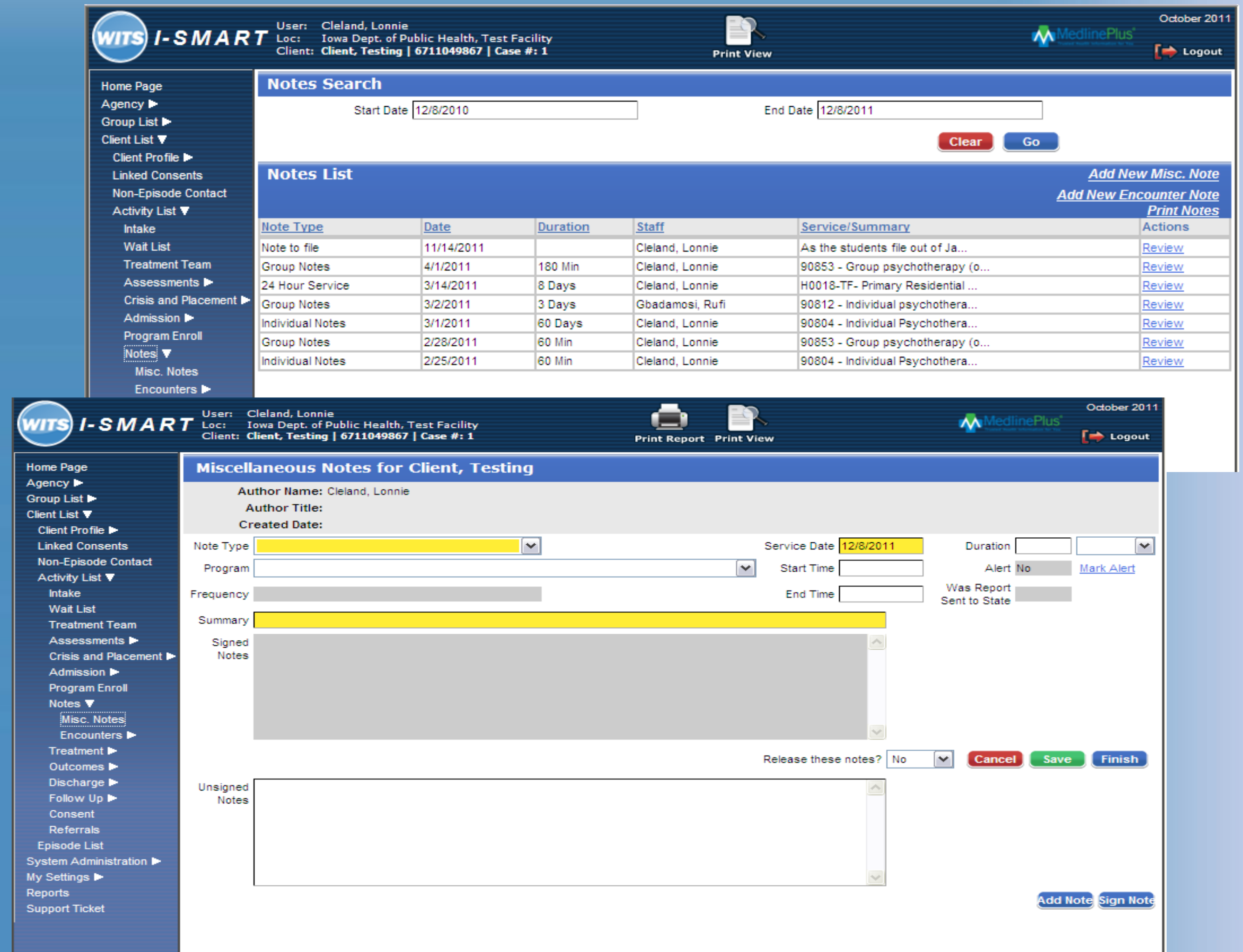
3. Clicking the **Review** hyperlink for the note you wish to see will bring up the first screen of the note chosen.



Notes

Miscellaneous Notes

4. To review an existing **Miscellaneous Note** click on **Review** under the **Actions** column.
5. To add a new **Miscellaneous Note** click the **Add New Misc. Notes Record hyperlink**. This will bring you to the screen to enter the details.
6. To set an alert related to this **Note** click the **Mark Alert** hyperlink. This will highlight the client's name in red on the **Client List**. To remove the alert click the **Remove Alert** hyperlink.



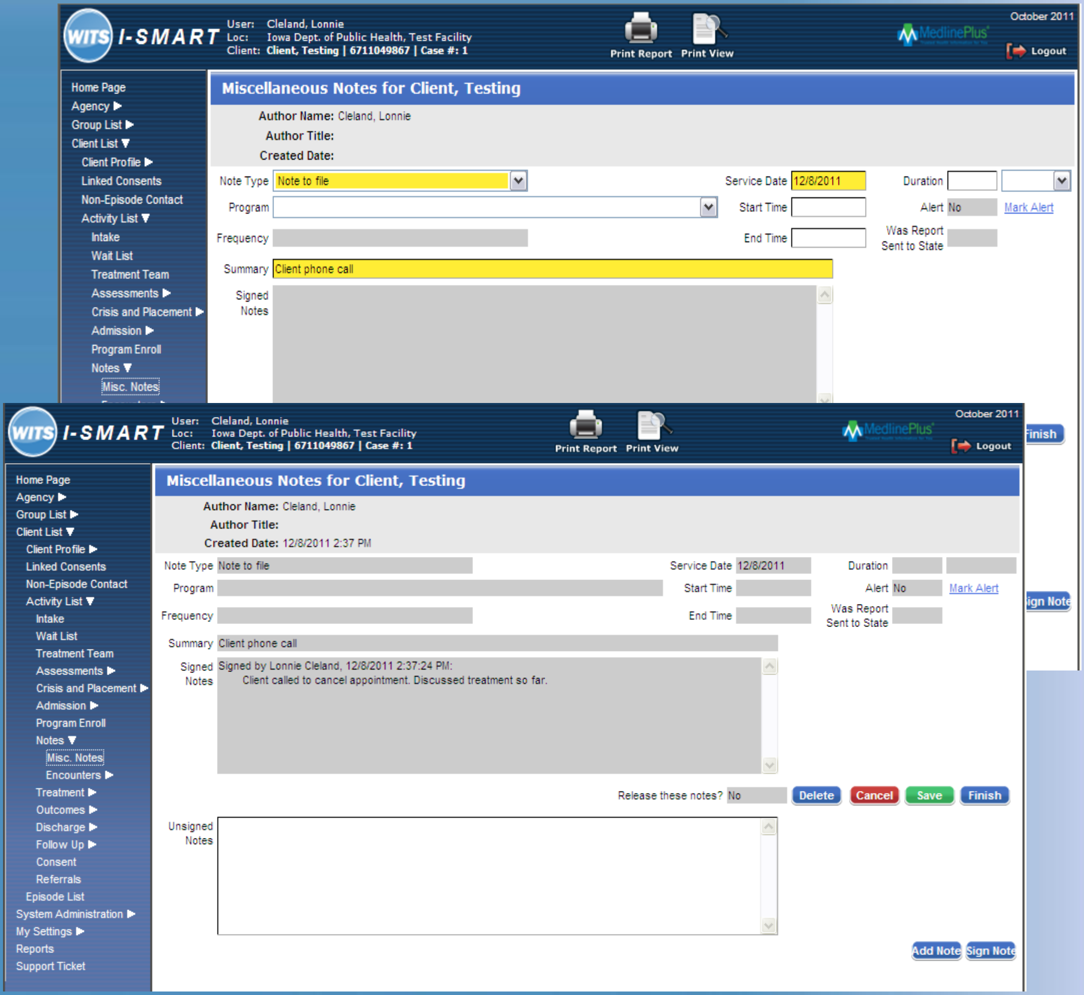
Notes

Miscellaneous Notes

7. Select the **Note Type** from the drop-down. The **Date** will pre-populate with the current date. This can be changed as needed. Enter the **Start Time**, **End Time**, and **Duration**, if desired**.**

8. Write a one line **Summary** in the appropriate text box. This summary will be shown 0n the **Notes List** screen.

9. Write the detailed note in the **Unsigned Notes** text box. There is unlimited space to type in this box. When done, click the **Signed Notes** button to move the note into the **Signed Notes** text box. Click **Save** and/or **Finish** when you are done to save the information.

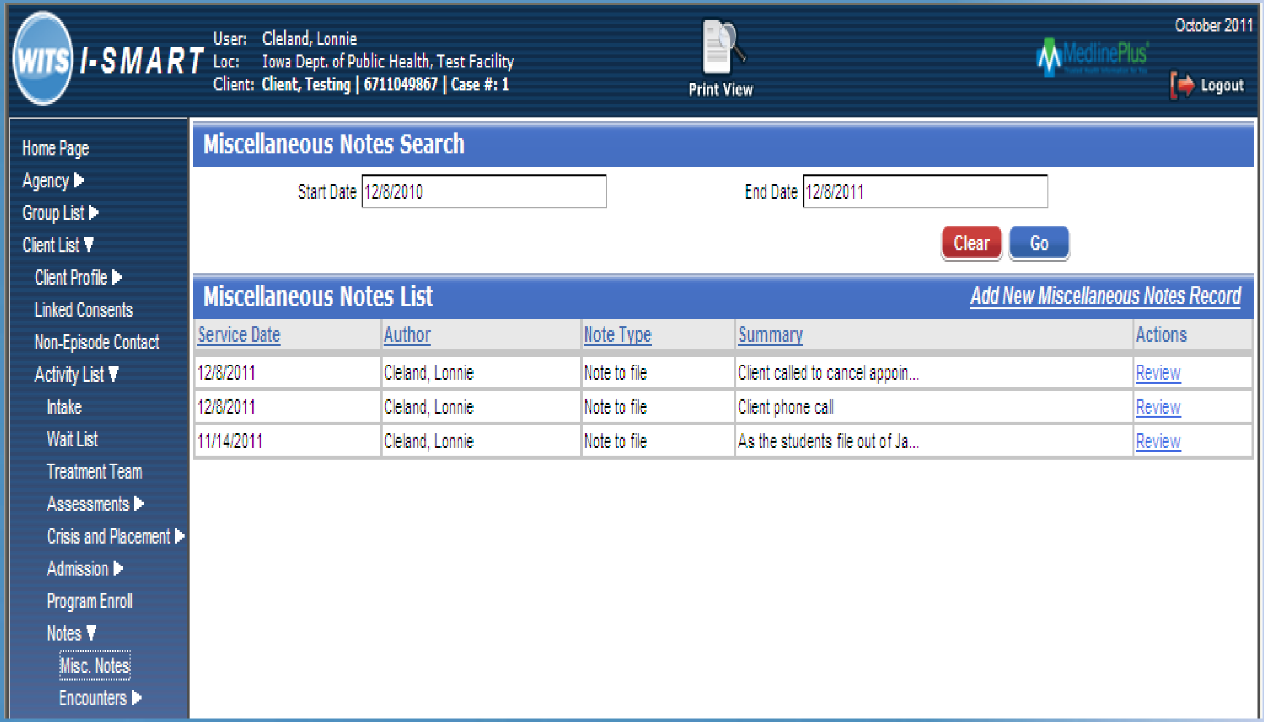


Notes

Miscellaneous Notes

10. **Finish** will take you back to the **Miscellaneous Notes List** where you will see the note you just entered listed.

11. To review an existing **Miscellaneous Note** click on **<u>Review</u>** under the Actions column.



Notes

Encounters

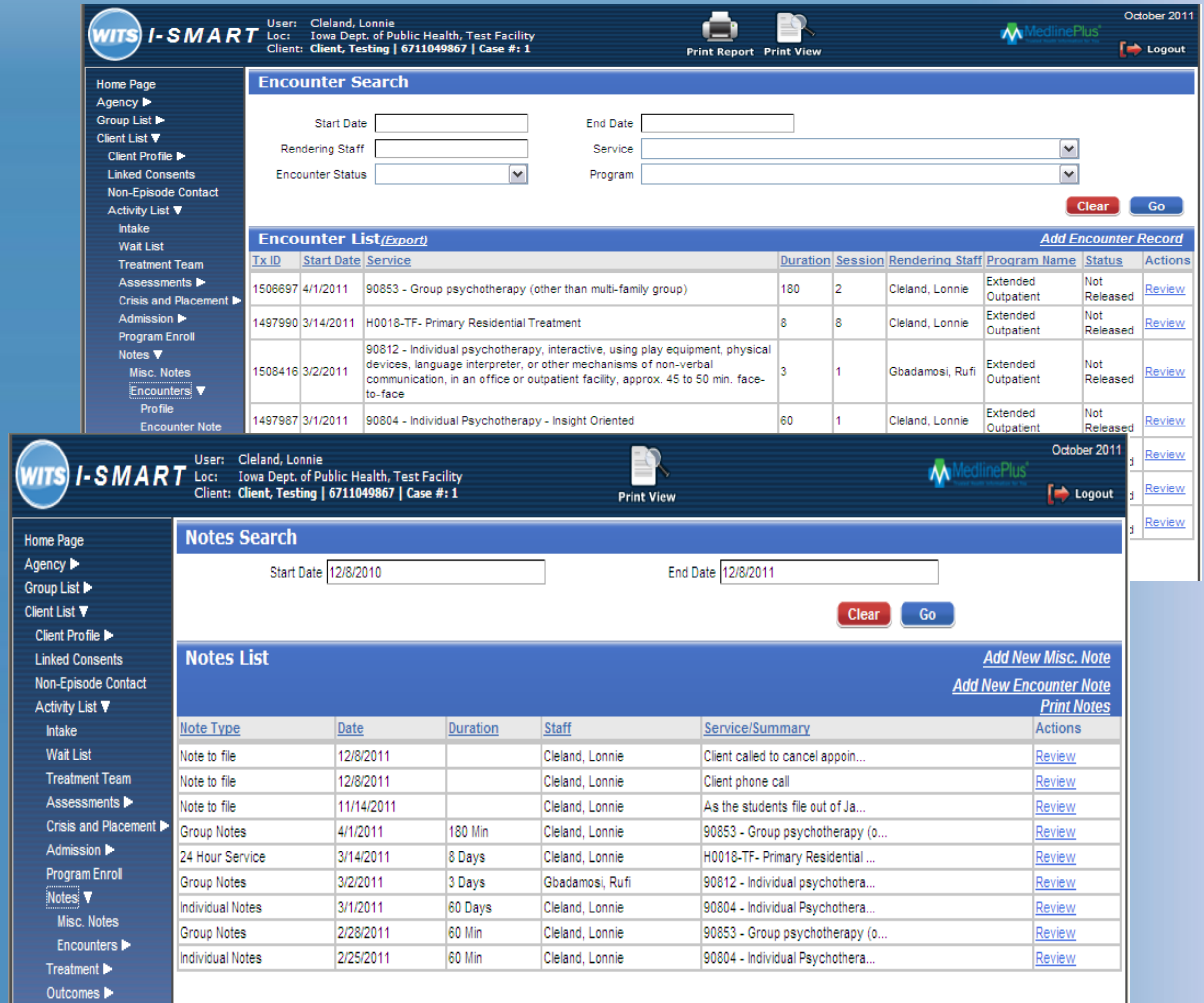
12. The Encounter Notes sub-module is where you document the details of the face-to-face services provided a client.

13. Clicking on **Encounters** in the left-hand menu brings up the **Encounter Search and List** screen.

14. Had you clicked **Notes** on the left-hand menu, you would have brought up the **Notes Search and List** screen. This lists both **Misc. Notes** and **Encounters**. Notice you can add either a **New Misc. Note** or **Add New Billable Note** from this screen. **Add New Billable Note** and **Add Encounter Record** are the same thing.

15. If you are at the **Encounter** screen, you can either select an **Encounter** listed on the screen by clicking the **Review** hyperlink, or choose to **Add Encounter Record** to add a new record.

16. Selecting **Add Encounter Record** opens the **Encounter Profile** screen.



Notes

Encounters

17. Select **Encounter Type** and from the drop-down box. Face-to-face encounter types are either **Individual**, **Group** or **Family** session. **24 Hour Service** type is used to document services specific to agencies that treat clients on an inpatient or residential basis.

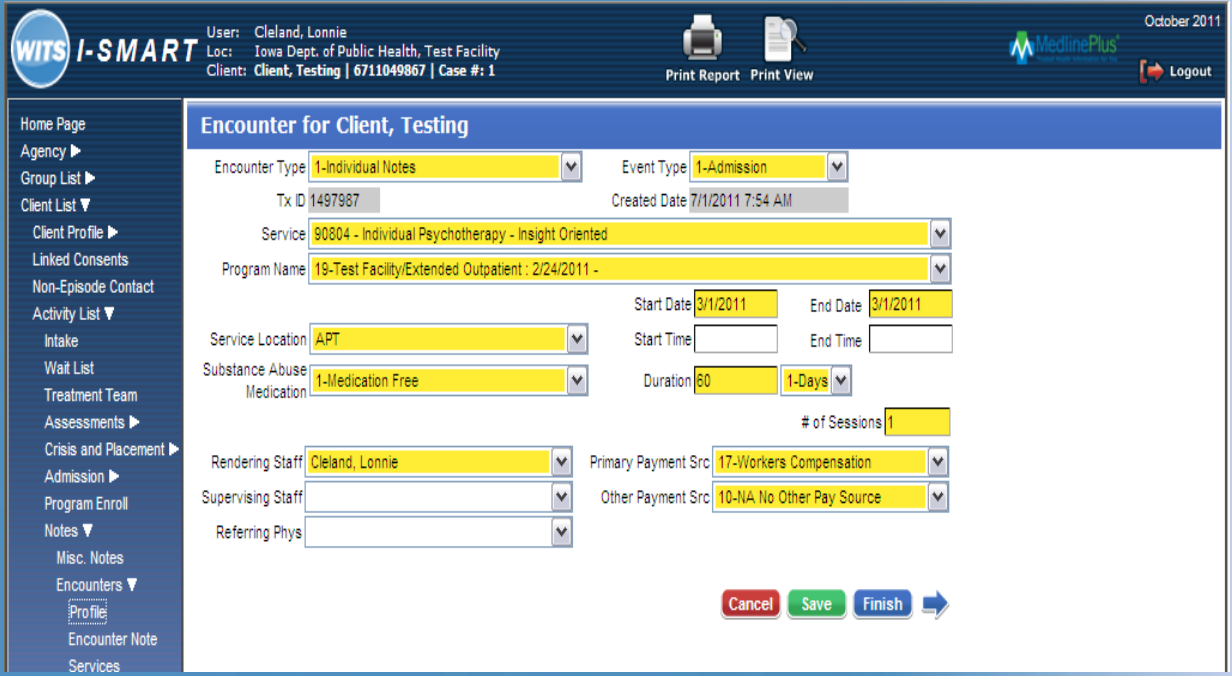
18. **Event Type**: This box is used to document whether the client is being seen for a service as an admitted client, a placement screening or a crisis contact.

19. **Service**: Select the specific service being delivered. The codes are listed in numerical order as they are CPT billing codes.

20. Select the options for **Program Name** and **Service Location. Program Name** will pre-populate with the name of the program in which the client is enrolled.

21. **Substance Abuse Medication**: Most clients are Medication Free. If a client is taking a medication used to inhibit substance use, to detoxify or used as maintenance such as Methadone, select the appropriate response. **Note**: This field is not to be used to document psychotropic medications.

22. **TX Start Date** / **TX End Date:** Used to capture the span of time during which sessions were provided**.** For a single session encounter, the **TX Start Date** and **TX End Date** will be the same.



Notes

Encounters

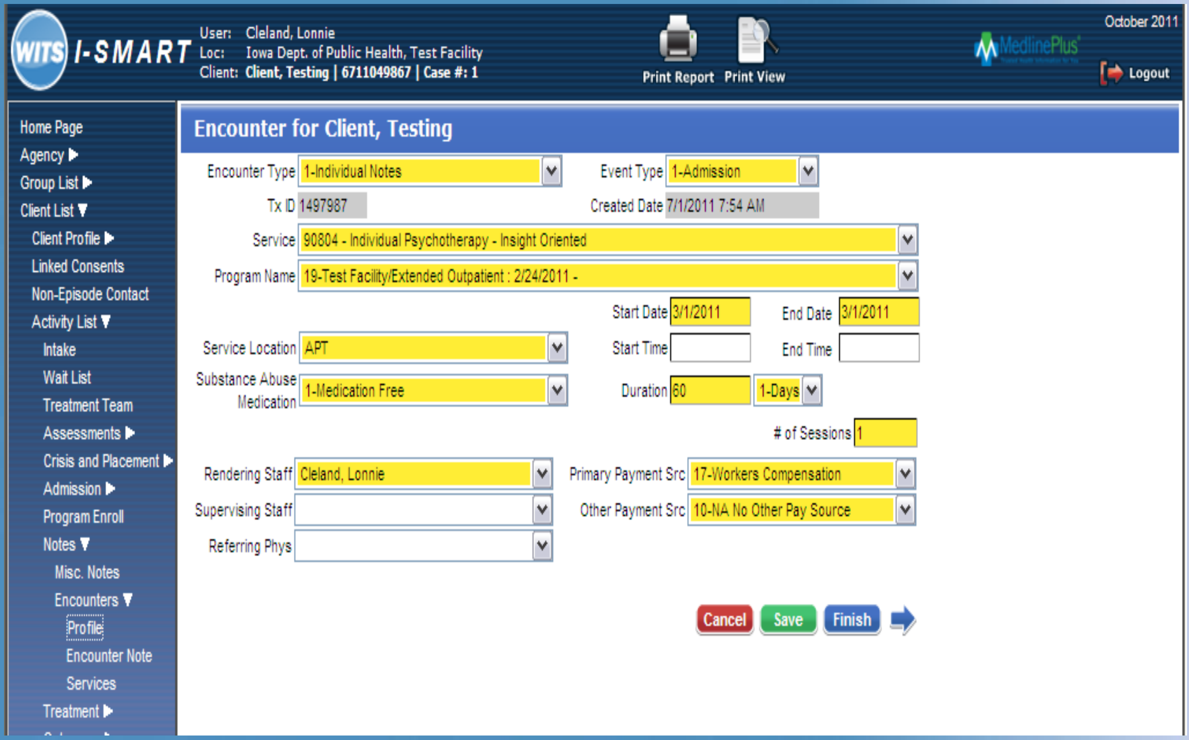
23. **Rendering Staff** information comes pre-filled based on your login. It can be changed if the person who delivered the service was different from the person documenting it.

24. **Duration**: Duration may be entered in either Minutes (Min) or Days. **Individual**, **Group** and **Family** sessions must be entered in Minutes. **24 Hour Services** must be entered in Days.
Note: For Outpatient levels of care (Level II.5 or lower) the **Encounter End Date will be the same as the Encounter Start Date.**
For Residential levels of care (Level III.1 or Higher)as date range may be used to enter per diem services.

24. **# of Sessions**: Number of sessions being documented.

25. **Primary Payment Src / Other Payment Src**: **Primary Payment Src** will autofill with information entered in the **Admission** module. **Other Payment Src** will be blank on the first encounter. Thereafter it will autofill with whatever choice was entered in the previous encounter. Should payment sources for a client change over the course of treatment, changing them on the **Encounter Profile** screen will allow the agency to track this change over time by using the **Reports** module **Encounter Data** report.

26. **Next** will take the user to the **Encounter Notes** screen.



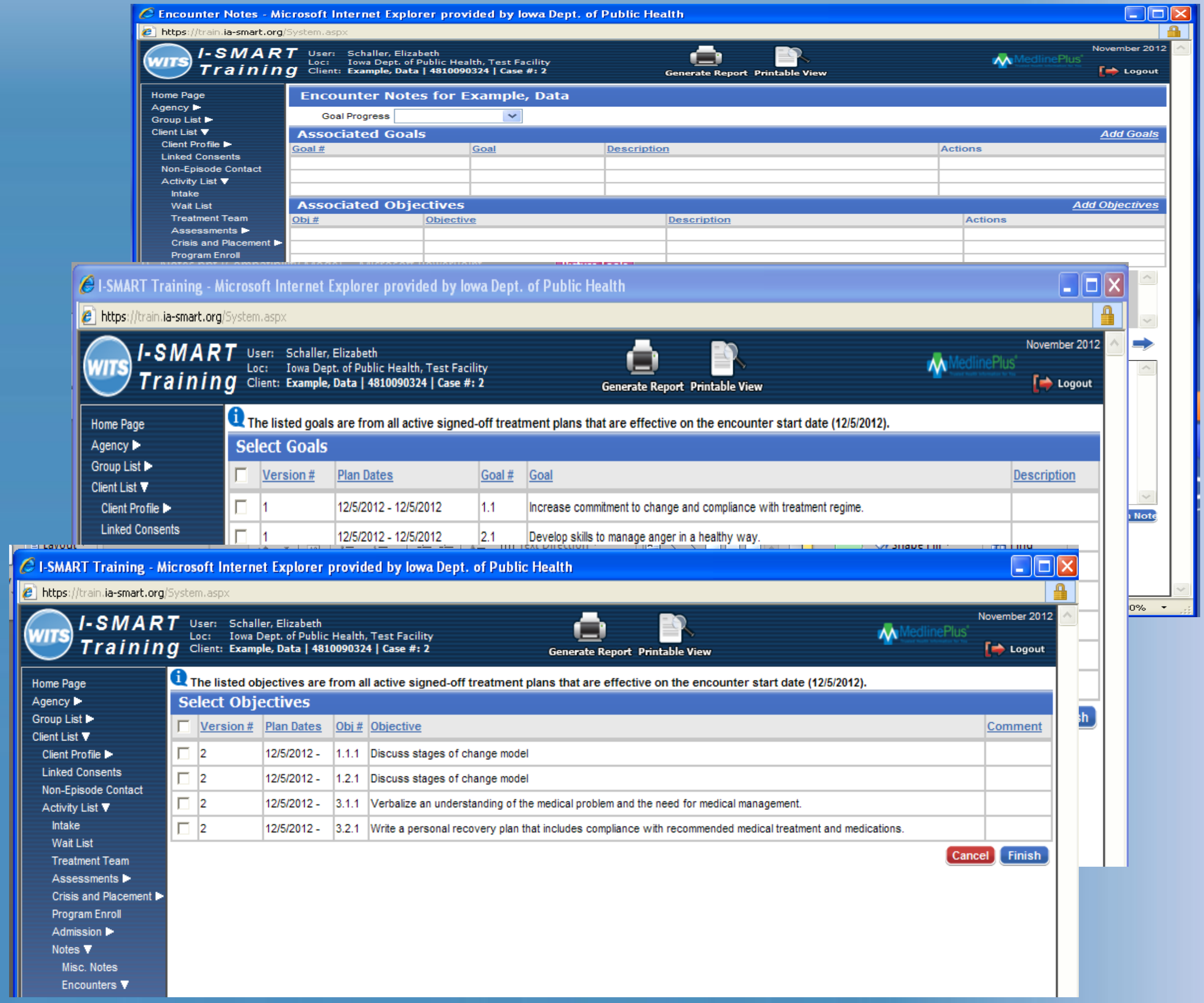
Notes

Encounters

27. On the **Encounter Notes** screen you can select the **Goals** and **Objectives** from the treatment plan that were addressed in this session.

28. To add a **Goal** or **Objective** click the **Add Goals** or **Add Objectives** hyperlink. You can select the relevant goals or objectives by clicking the box to the left of the appropriate goal or objective. Click **Finish** to return to the **Notes** screen. The goals or objectives you selected will be listed under the **Associated Goals** or **Associated Objectives**.

    Note: You can delete the **Goals** or **Objectives** from the **Encounter Note** by using the **Delete** hyperlinks.



Notes

Encounters

29. Write a detailed **Narrative** in the **Unsigned Notes** text box provided.

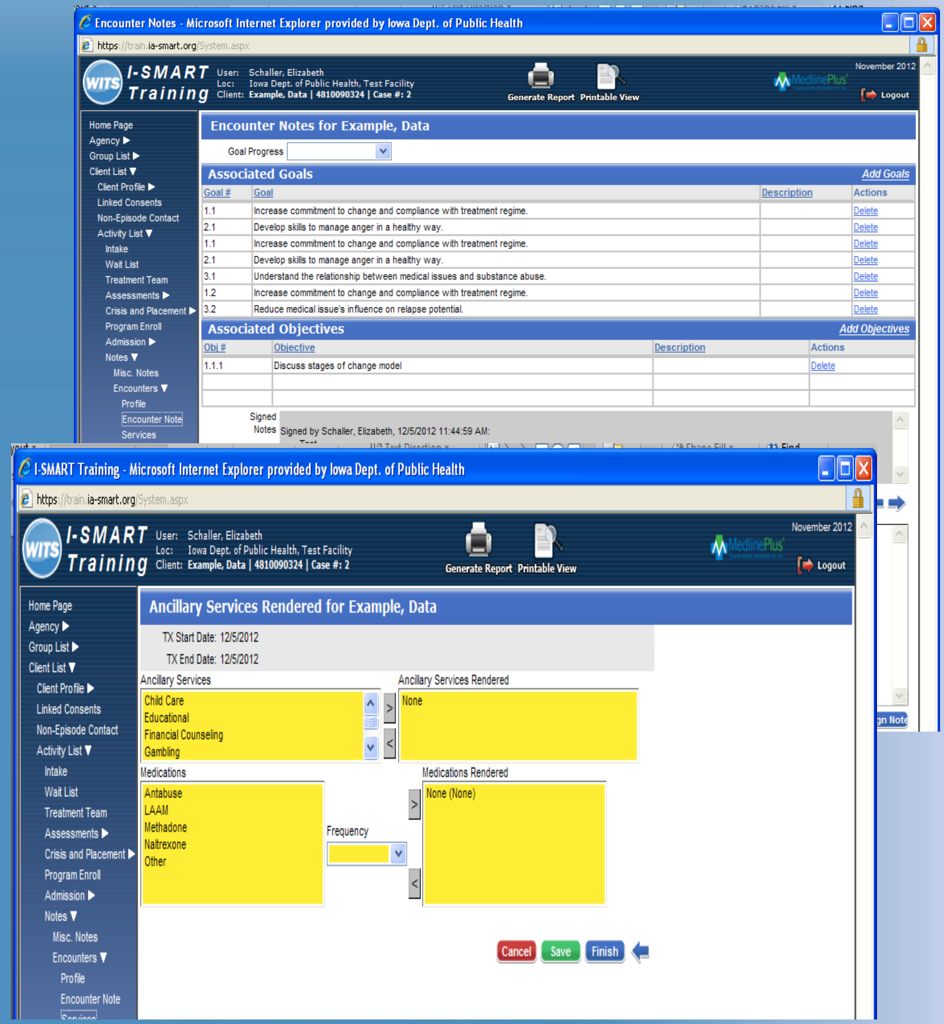
30. Click **Sign Notes** go move the narrative to the Signed Notes text box.

31. **Next** will take you to the **Ancillary Services** screen. The **Ancillary Services** screen allows you to document ancillary services and substance use inhibiting medications rendered to the client during the period covered by the dates you entered on the **Encounter Profile** screen.

32. **Ancillary Services Rendered**: Select the applicable ancillary services in the this box. You may hold the Ctrl key down to make multiple selections at the same time. When you select the item, its background will turn dark. After selecting all the appropriate services click the right pointing arrow for the **Services** to move to the **Services Rendered** box. To unselect a service click on it in the **Services Rendered** box and click the left pointing arrow.

33. **Medications:** Select the medications as applicable in the left hand box. Then select the frequency from the drop-down box in the middle. After that click the right pointing arrow for the **Medications** to move to the **Medications Rendered** box on the right. To unselect a medication click on it in the **Medications Rendered** box and click the left pointing arrow.

34. Click **Finish**.



Notes

Group Notes

The Group Notes module allows you to manage group therapy sessions and encounters in one location. The user can create group therapy session notes, transfer them to each client's individual file, and create encounters to document services. The Group Notes module is a stand alone module because it is not associated with any one client's file.

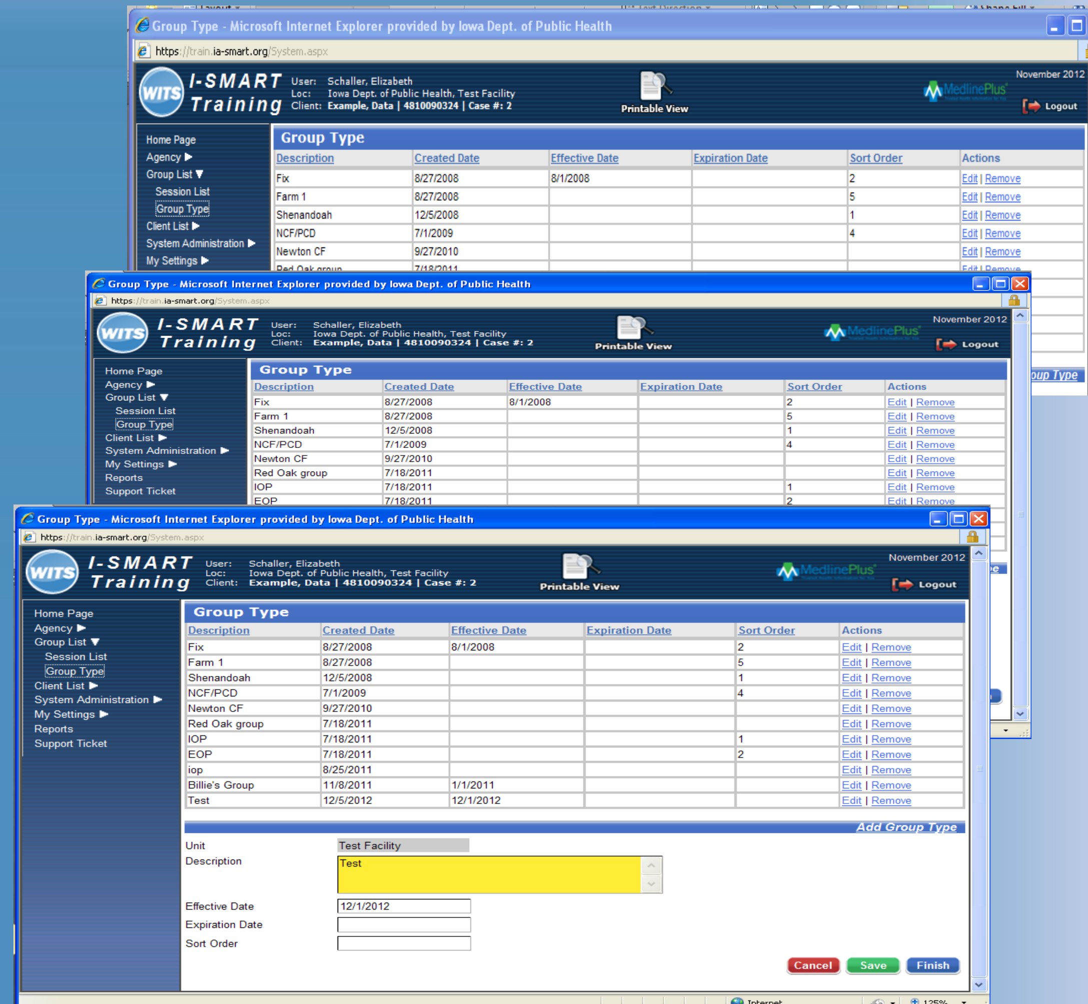
35. **Group List**: The **Group List** module enables the user to set up treatment groups and to then document each client's participation in any or all listed groups.

36. There are two headings under **Group List**: 1. **Session List** and 2. **Group Type**.

37. **Group Type**: The **Group Type** module requires the user to set up and maintain a list of various types of groups that the agency's facilities are running at any one time. This must be done in order to set up a specific group. Each of the Group Types that are set up will be added to the **Group Type** drop down on the **Group Profile** screen.

38. Click the **Add Group Type** hyperlink. This opens the Group Type Description, Dates and Sort Order fields for editing.

39. **Finish** adds the Group Description to the **Group Type** list. Each facility can have its own list of Group Types. For example agencies might choose to create groups such as Intensive Outpatient, Extended Outpatient, Relapse and so forth. Then, you can add groups of any name within each of these categories.



Notes

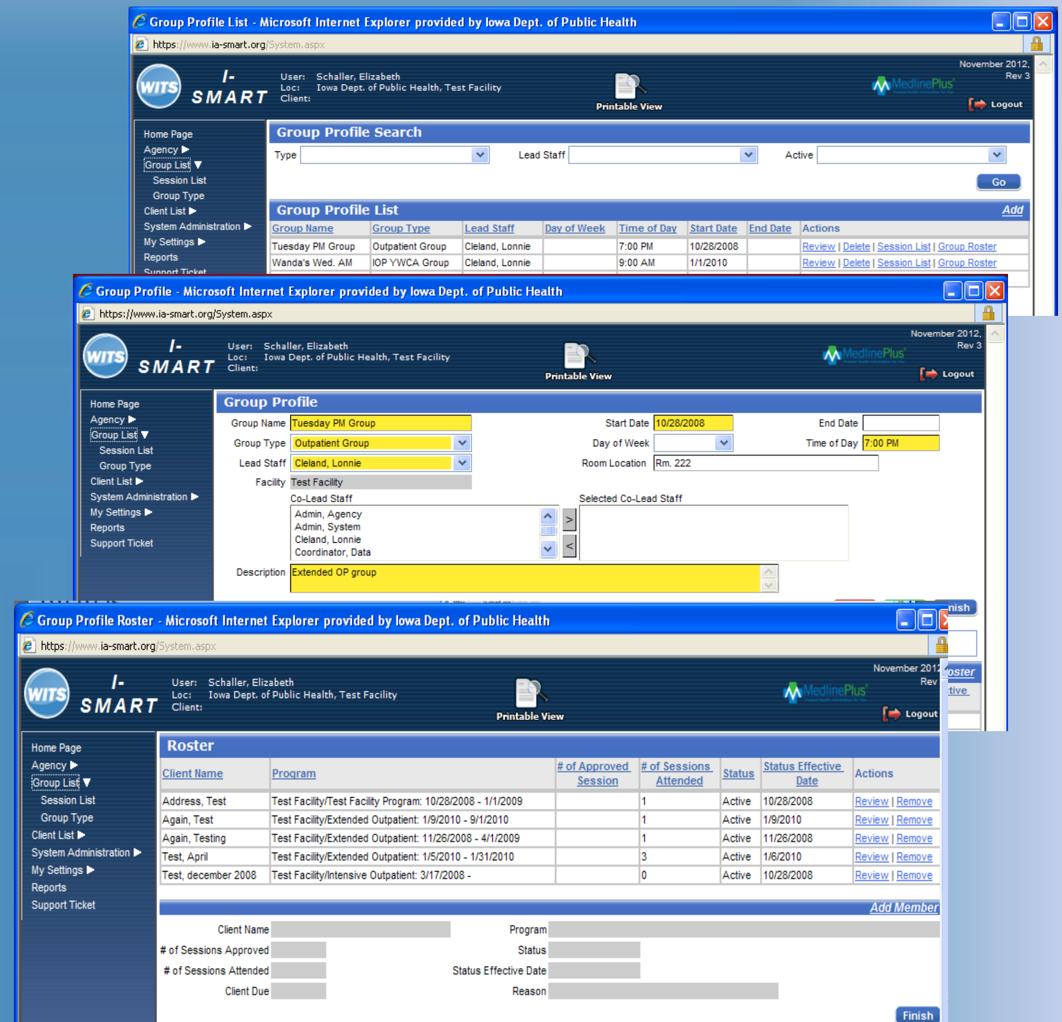
Group Notes

The **Group Profile List** shows all groups active in the agency.

40. Notice the Jason Test Group is the **Group Name** while its **Group Type** is Relapse Prevention. Relapse Prevention was one of the **Group Types** that was set up in the **Group Type** sub-module. **Review** will open each group's profile for editing. **Delete** will delete a particular group from the **Group List**. **Session List** opens the list of documented sessions for this particular group.

41. **Create Group Session**: Opens the **Group Session Notes** screen to document a group session.

42. **Edit Roster**: This will open the **Roster** screen. **Add Member** will allow you to add any client to the roster. **Review** opens existing roster members for edit. **Remove** will remove clients from this list. Finish returns the user to the **Group Profile** screen.



Notes

Group Notes

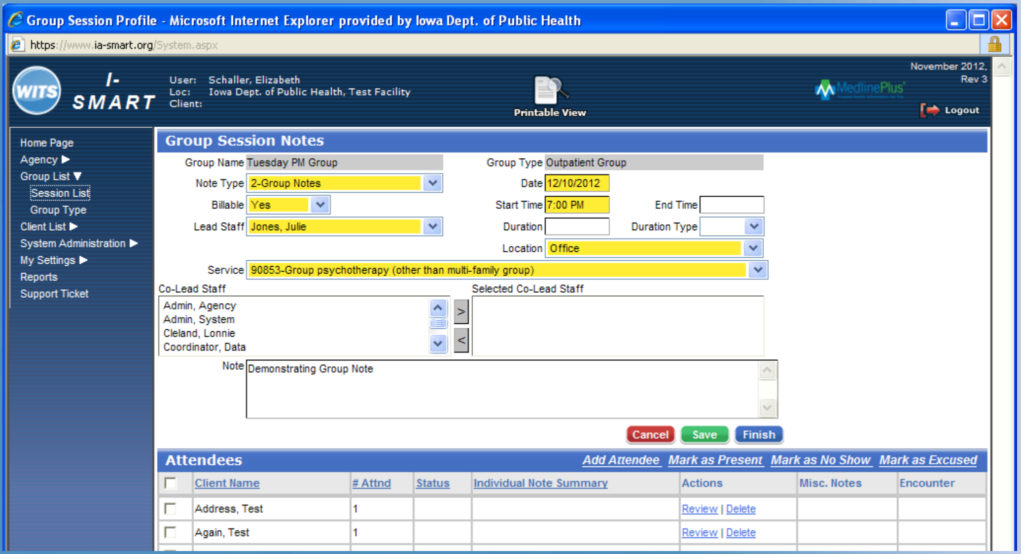
43. The **Group Session Notes** screen documents the type of note, date, time, and location of the group. It is used to create the group's actual session note, begin the creation process for **Encounters** and to document group member's participation.

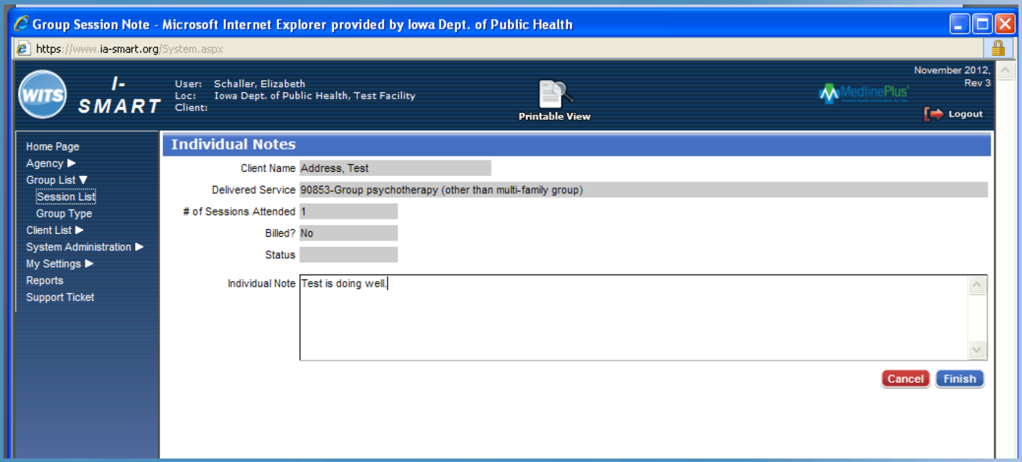
44. Entering text in the **Note** box will update each of the selected clients' individual files with the Group Note when **Finish** is clicked.

45. **Mark as Present**, **Mark as No Show**, **Mark as Excused** all update the group roster for those clients checked in the **Client Name** column.

46. **Review**: Opens the **Individual Notes** screen. Entering text in the notes box and clicking Finish will update the client's individual file when an **Encounter** is created. **Finish** return user to the **Group Session Notes** screen.

47. **Note**: If a client is missing from the group's Attendee list choose **Add Attendee**. This will open the **Individual Notes** screen where you can manually add a client's name and Individual note. The **Client Name** drop down will contain the names of all clients on the group roster that are not listed on the **Attendee List**. If the client's name is not present, you will have to add the client to the group roster by returning to the **Group Profile** screen to **Edit Roster**. See # 38 above.



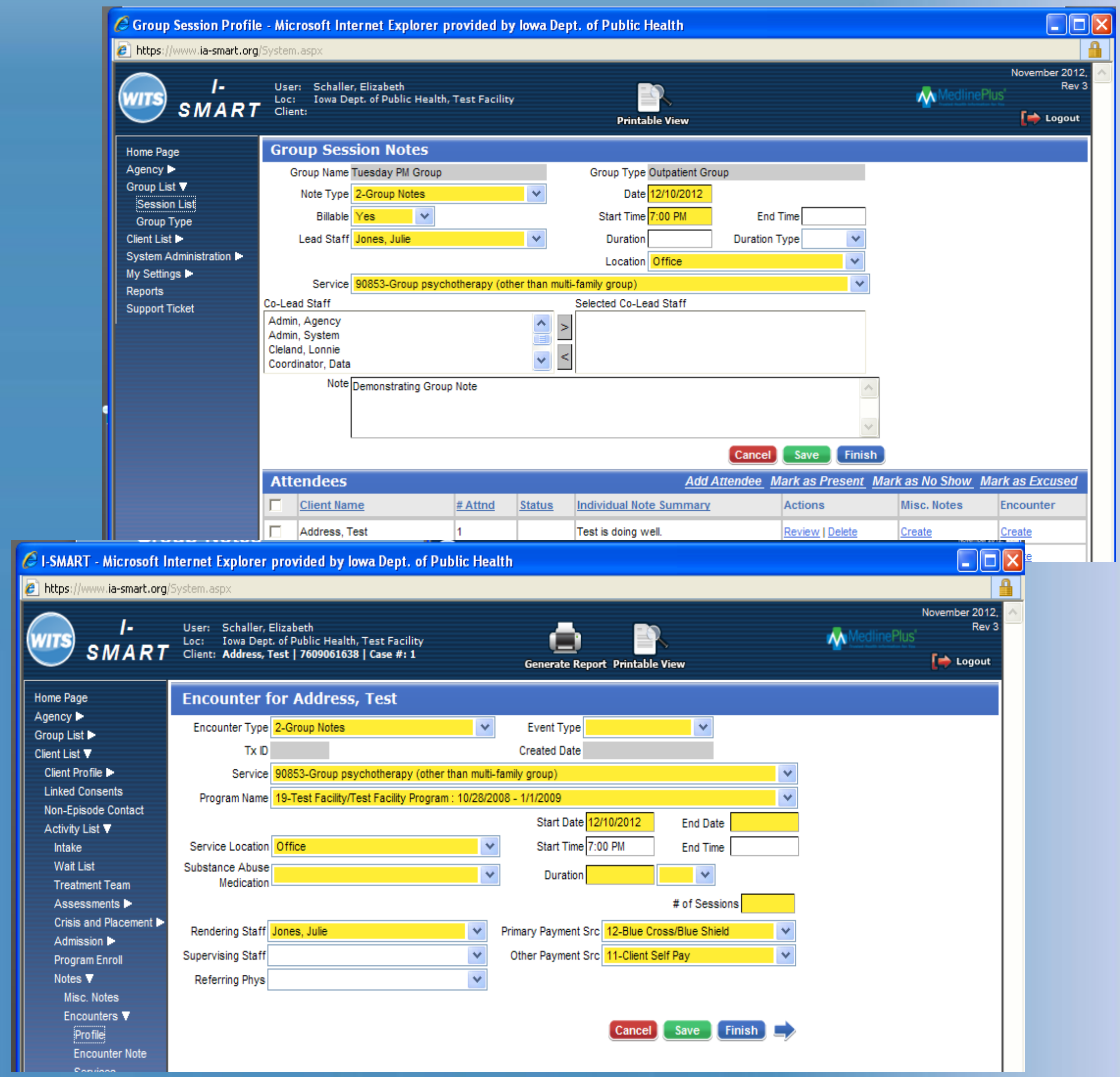


Notes

Group Notes

48. Notice the **Create** hyperlinks under **Misc. Notes** and **Encounters** column headings. Choosing the **Create** link under **Encounter** will open the chosen client's **Notes/Encounter** module to document the group session in the client file. Up until this point, the session has only been documented in the Group Notes module.

49. Notice that significant portions of the **Encounter** including **Start Date** and **End Date** have been autofilled by the system. Complete the rest of the screen. **Next** moves you on to the **Encounter Notes** screen.



Notes

Group Notes

50. Notice that the Unsigned Notes text box is autofilled with the text you entered in both the **Individual and Group Notes** text boxes.

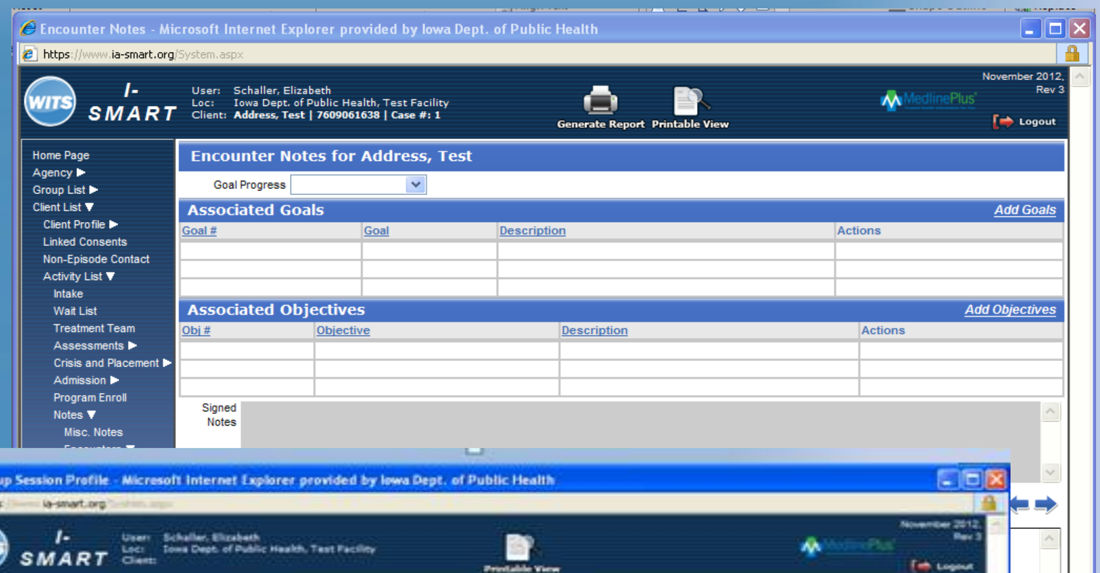
51. Simply proceed as you would any other encounter by adding **Goals**, **Objectives** and **Goal Progress** if desired.

52. **Sign Note** then click **Next** to complete the **Ancillary Services Note**.

53. Finish at the **Ancillary Services** screen will take you back to the **Group Session Profile**.

54. Notice the hyperlink under **Encounter** for our client Manual Example has changed to **View**. Clicking **View** will take you to the **Encounter Profile** screen.

55. **Finish** will return you to the **Group Session List**.

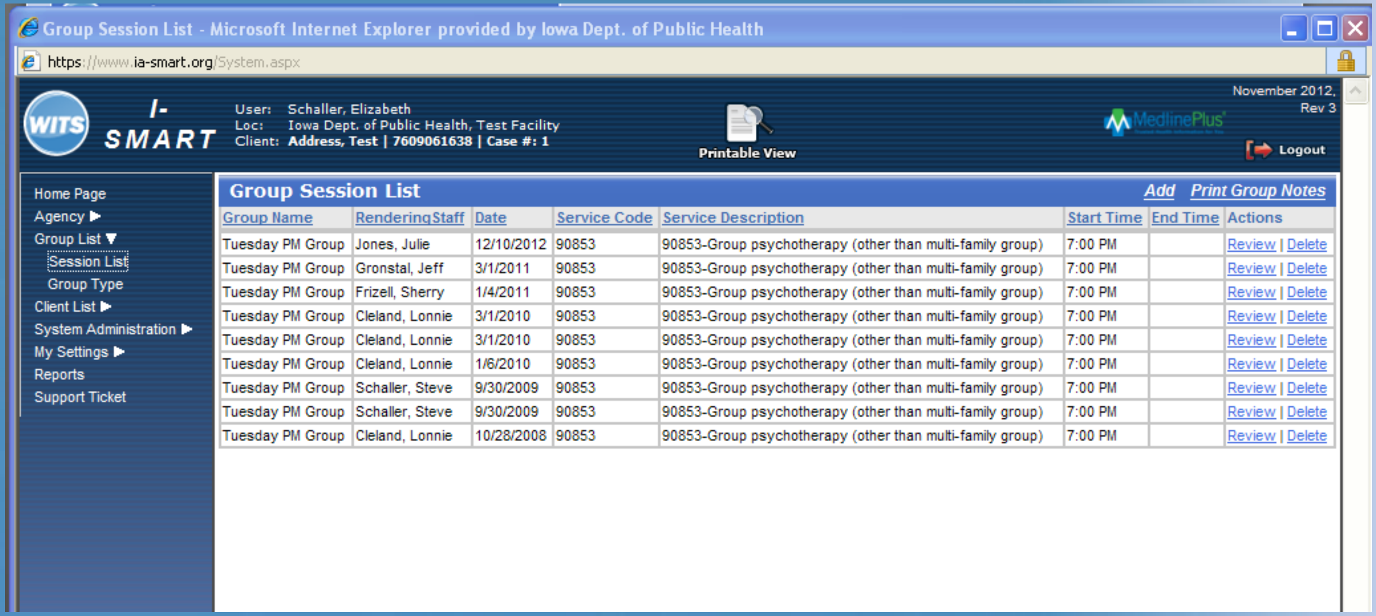


Notes

Group Notes

56. Notice the Group Session List now includes any group sessions you recently documented.

57. **Add** will open the **Group Session Notes** screen allowing you to create another group note. See # 39 above.



Group Name	RenderingStaff	Date	Service Code	Service Description	Start Time	End Time	Actions
Tuesday PM Group	Jones, Julie	12/10/2012	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		Review | Delete
Tuesday PM Group	Gronstal, Jeff	3/1/2011	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		Review | Delete
Tuesday PM Group	Frizell, Sherry	1/4/2011	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		Review | Delete
Tuesday PM Group	Cleland, Lonnie	3/1/2010	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		Review | Delete
Tuesday PM Group	Cleland, Lonnie	3/1/2010	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		Review | Delete
Tuesday PM Group	Cleland, Lonnie	1/6/2010	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		Review | Delete
Tuesday PM Group	Schaller, Steve	9/30/2009	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		Review | Delete
Tuesday PM Group	Schaller, Steve	9/30/2009	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		Review | Delete
Tuesday PM Group	Cleland, Lonnie	10/28/2008	90853	90853-Group psychotherapy (other than multi-family group)	7:00 PM		Review | Delete